



Home Essentials

Quick Start Guide

Home Essentials is the secure online service where you record, keep track of, and protect all your precious belongings and memories. This guide contains quick and easy tips that will help you get the most from your service.

Are you Emergency Ready?

Natural disasters in Australia are a part of our lives and touch us more often than we'd care to admit. Whether it is fire, flood or storm, the devastation left behind produces the same sense of loss.

With only moments to think about what to take with you when tragedy occurs, it's no surprise that most people are unprepared to deal with adversity.

Disasters strike quickly and don't give you time to collect valuables and documents as you flee from your home.

Have you ever considered the *non-financial* cost that a major family emergency will have on your lifestyle? The loss or destruction of life-long possessions and its effect on health and wellbeing cannot be overstated.

For millions of Australians the heartache of losing precious memories or belongings turns to devastation when they are unable to prove what they own and the value of their insurance doesn't measure up to the replacement cost.

In Australia, 1 out of 4 households experience a home burglary - 50% more in cities!¹. Every year 60,000 cars stolen along with their contents and 18,000 are never recovered². Yet alarmingly, very few people have a secure record of all their assets and even fewer are confident that their insurance cover is sufficient.

Unfortunately it's often not until a claim is experienced that the value of their home and assets is found to be drastically underestimated. This leads to underinsurance and the realisation that there can be a wide difference between the insured policy value and the actual recovery cost.

Having accurate proof of ownership and keeping your insurer informed will speed up the claims process and ensure you are correctly reimbursed - with minimal family stress.

If you haven't recently reviewed your contents insurance, conducted a home audit or created a family archive, then you are at serious risk of being under-insured and under-prepared!

Home Essentials from Saropa is your secure service to plan, protect and recover from any disaster or emergency.



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About Saropa®

Saropa Pty Ltd is an Australian financial technology company and a leading provider of online disaster recovery solutions for home owners and businesses.

Our team have extensive experience in top-tier financial technology and we are passionate believers in personal risk management. We are engaged and excited about our vision for family security and this encourages our culture of innovation.

We have created partnerships with experienced Australian organisations to provide risk management solutions to their clients.

The inspiration for building the Essentials services came from personal experience with the frustration, delays and distress that emergencies can bring. The trauma of events that trigger a claim, the hassle of finding and producing documentation evidence of ownership at claim is significant. Some things, our truly most precious possessions, can be lost forever.

Our long experience history in financial technology presents us with a great opportunity to bring better advice, tools and financial literacy opportunities to all Australians.

We strive to give our members the peace of mind that if a disaster strikes, their detailed plan enables them to:

- Contact the most important people to reduce the stress of others
- Print reports itemising everything that has been damaged, stolen or lost
- Prove exactly what they own with serial numbers, photos and purchase details
- Ensure that key contact names and numbers are on hand
- Electronically recover precious photos, documents and certificates

Our ability to innovate is our strength. This defines our approach to everything we do.



Four Pillars Security Policy

Saropa® is committed to your privacy and the security of your information. We invest in the highest level of security available to Internet users and employ the same measures used by financial institutions. Our servers are located in the highest rated facility in Australia – Tier 3+ Rate, with 24x7 on-site security guards and an array of internal and external CCTV cameras.

In the event of an emergency, you can rely on your accounts with Saropa® Home and Business Essentials being available even when access to your home, work place, safe or safety deposit box is inaccessible or destroyed.



1 - SECURITY TECHNOLOGY

Saropa is committed to only using the latest technology in Internet security.

Within our the state-of-the-art operations hub, Saropa is equipped with Intrusion Detection Systems to maximize security.

2 - ALWAYS AVAILABLE - 24 x 7

Saropa employs systems that monitor network traffic to identify and quickly correct service interruptions.

Server power and cooling are provided by a battery of rotary UPS units, controlled humidity, roof chillers, and on-site diesel tanks.

3 - STRICT PRIVACY POLICY

Saropa adheres to and operates within Privacy Legislation, so information entered into the website is yours at all times and cannot be accessed by staff.

Additional precautions are in place to protect personal information. Review our Privacy Policy online at www.saropa.com.au.

4 - PASSWORD PROTECTION

Saropa encrypts every piece of information entered before it is even sent to our servers.

Your account password must pass the minimum corporate level of complexity, so if you require assistance our support team will help you.

Learn more about Internet security at the Australian Government website: www.staysmartonline.gov.au

Getting Started

Saropa® Home and Business Essentials provides a number of tools that make it quick and easy to add items into the system.

Before you start creating your inventory, take time to organise yourself. For example, we recommend you access:

1. Digital Camera

A digital camera is a must for anyone preparing to create an asset inventory. Your account has a fixed disk space limit so attention to camera resolution will allow you to upload more images.

2. Document and Photo Scanner

A scanner is a great tool to use for storing certificates, papers, old photos and memorabilia.

3. Video Camera

Used like a digital camera, a video breakdown of assets by room can be a valuable reference.

4. Finance Papers

Collect all your insurance and financial papers. Some documents may be in your email account or on your PC.

5. Location Inventory

Electronics and appliances have serial numbers that make them identifiable if stolen. The numbers are located on the back of these appliances.

Methodically spend time cataloguing each location until you are done, taking time to enter as much detail as you can on each item before moving on to the next.

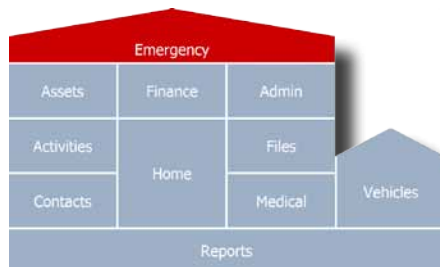
Now you're ready!



About Work Centres

Saropa® Home and Business Essentials organises your information around six key operational areas called “Centres”.

Centres are accessible from the main menu that runs across the top of the screen or from the site map that looks like a house:



The six key operational centres are:

- **Asset Centre** – for managing assets, vehicles, property and the locations within the property
- **Finance Centre** – for managing insurance, banking and budgeting
- **File Centre** – for safekeeping important documents and precious photos
- **Contact Centre** – for managing your address book and important contact lists
- **Medical Centre** – for managing your family’s or staff health records
- **Activity Centre** – for managing key dates, reminders, notes and passwords

Additionally, there are four special centres that summarize information from the key areas above for easy access:

- **Emergency Centre** – displays the most critical information for instant access when you need it
- **Insurance Assessment** – reviews your insurance position
- **Report Centre** – for generating special reports and export data into other systems
- **Dashboard** – the complete view of your account with summary tables and important alerts

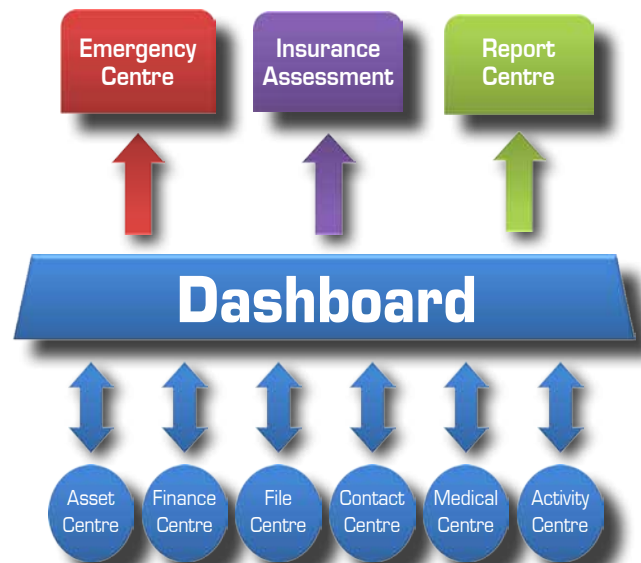


Table Anatomy

There are several features common to all tables that are worth noting:

1. Filters

Use the drop lists to filter by types and dates, or simply type keywords and click the Search button. If the search result is not visible in the table, click on the row to open the item detail page.

2. Quick Sorting

Click on any table header to sort by that column. Clicking again will reverse the order. This is useful feature to find the last item added or most (least) valuable items.

3. Check Selectors

Make changes in bulk by selecting multiple items in a table - select/deselect all by clicking on the box in the table header. Bulk actions for selected items are accessed with the buttons under the table.

4. File Icons

Click on an icon in the file table to download the default file. Files will be opened automatically, and images will appear in a slideshow.

5. Interactive Tables

Hover your mouse cursor over a cell to see extra information and click to view item details. Use the Edit links to modify items directly.



6. Collapsible Panels

Click on the (-) or (+) icon to hide or show groups of information. This is useful for customising screen layout before printing.

7. Table Links

Below each table are links to add new items or focus on a sub-set of items. Many tables also have Edit columns allowing you to edit directly.

Policy List

1	All Policy Types		Search...	Search	6			
2	File	Provider	Type	Description	Insured Value	Insured Balance	Renewal	Edit
<input type="checkbox"/>		AAMI	Boat Insurance	Fishing Boat Policy	\$3,500.00	-\$3,500.00	16 Jun 2009	Edit
<input type="checkbox"/>		AAMI Insurance	Caravan Insurance	Holiday Camper Policy	\$9,670.00	\$6,670.00	17 Nov 2008	Edit

3 7



Home Essentials

Emergency Centre

For when things go wrong

Need to Know

- Critical information is at-a-glance
- Create emergency contact sheets
- Fast printing and media safeguarding

DO YOU HAVE A STRATEGY to effectively deal with emergency situations and disasters when they occur? There are many types of emergencies that can affect your household. Preparation and practice reduces the common stress that emergency events have on your family.

Your household should be prepared for its own unique circumstances - from dependants to animal care and evacuation routes. It is critical that your emergency plan is shared, practiced and available to everyone in your home.

Use the **EMERGENCY CENTRE** to get the peace of mind that when an emergency situation occurs, critical information can be accessed quickly - even when the house or safe is inaccessible.

THINGS YOU CAN DO:

- Upload emergency and legal documents
- Record emergency plans, assign emergency and disaster contacts
- Add security options for assets and insurance policies



Home - Emergency Centre

The screen shows the most important information for managing an emergency or disaster situation. Use the Quick Recovery and Quick Plans for a specific instructions in the event of an emergency.

Emergency Reminders (3 Emergency Reminders)

File	Alert Date	Event Type	Event Name	Description	Edit
	18 Feb 2010	Other	Notify Michel's Work in Case of Emergency	03 8742 2345	Edit

Delete Selected Add Reminder Manage Reminders

Emergency Files (3 Emergency Files)

File	Source	Emergency Group	Emergency Type	File Name	Version	Shared	Size	Updated	Created
	Expense	Planning	Alert	100%pdf	1	No	216 KB	18 Feb 2010	18 Feb 2010
	Expense	Planning	Alert	MyAlert_Eat_LivRe...	1	No	173 KB	18 Feb 2010	18 Feb 2010
	Option	Emergency	Pandemic Plan	H-6-1ad	1	No	270 KB	18 Feb 2010	18 Feb 2010
	Asset	Emergency	Disaster Recovery...	20080804RICE_Larg...	1	No	745 KB	26 Jun 2009	26 Jun 2009
	Police	General	Plan Chart	Priv Card Fact Sh...	1	No	498 KB	25 Jun 2009	25 Jul 2008

Sub Add File Add File Manage Plan

Quick Tip: Keep your emergency plan up-to-date and easy to access, by flagging your Contacts and Files for emergency use. Also prerecord reminders for things to do in an emergency.

Need to Know

- Automatic under-insurance warnings
- Generate insurance claims reports
- Upload multiple proof of ownership files

STORMS, BUSH-FIRES AND FLOODS provide a timely reminder to home owners regarding proof of ownership when claiming on insurance for items lost, destroyed, damaged or stolen.

Getting your insurance cover right is very important to protect your family and only regular review of your insurance needs will ensure that you have enough cover.

Insurance Assessment

Under-insurance Protection



Quick Tip: For asset-based insurance policies, compare the insured value against the asset value. Make sure the Insured Variance is never negative!

Accessed via the Finance Centre, use the **Insurance Assessment** to upload all your important policy documents, and securely record details that your insurance company may ask for.

THINGS YOU CAN DO:

- Upload purchase receipts and asset valuations
- Record storage locations and conditions or quality
- Track asset descriptions and identifiers such as serial numbers and asset tags

Asset Centre

Contents Inventory

Need to Know

- Comprehensive inventory of all that you own
- Create bulk lists or detail special items
- Store photos, receipts and current valuations

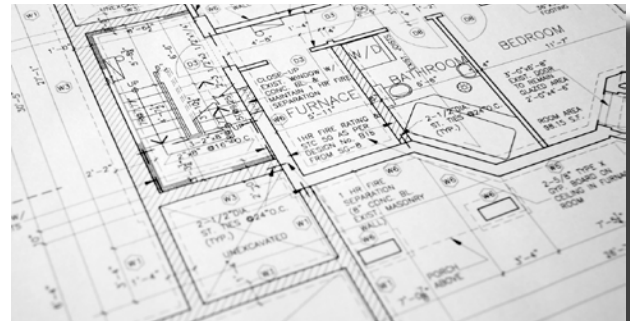
DO YOU HAVE THE PEACE OF MIND that you can easily prove ownership of everything that you own? Each year around 600 families lose everything to house-fires and 160,000 homes are damaged by severe flood and storm.

A good inventory provides information that is useful to daily tasks, asset tracking, and emergency incident responses.

Use the **ASSET CENTRE** to configure the details of locations, including photos. Securely and discretely record details of assets so that if a disaster strikes, ownership can be proved for insurance claims.

THINGS YOU CAN DO:

- Add a new location, room or storage area, and upload photos
- Add a new asset into the asset inventory and ID tag the asset
- Bulk add new assets by location and upload images and receipts



Asset Centre - Location View

Configure the details of the locations in your property and uploading location photos.

Location

Name: Boardroom
Type: Office
State/Prov: BC
24-Hour Location: No
Estimated Asset Value: \$10,200
Asset Count: 1
Total Asset Value: \$125,000.00
Highest Asset Value: \$375,000.00

Value Range	Count
100,000 - 500,000	1
50,000 - 100,000	1
10,000 - 50,000	1
1,000 - 10,000	1
Other Assets	1

Location Assets

File	Name	Type	Manufacturer	Purchase Date	Quantity	Value
	Leather chairs	Furniture-General	The Billion Leather	02 Jun 2009	12	\$15,000.00
	Oak Boardroom Table	Furniture-General	Herskole	02 Jun 2009	1	\$5,000.00
	Printer	Furniture-Accessories/Peripherals	HP	07 Dec 2009	2	\$10,000.00
	Projector & Screen	Electrical-Audio Visual	HP	01 Dec 2008	1	\$4,500.00
	Sound System	Electrical-Audio Visual	Bose	01 Dec 2009	1	\$8,000.00

Sub: Add Assets Add Asset On To Assets

Quick Tip: View assets in a location and see the most valuable items in the chart. Upload a photo of the location and enter the assets from what you see.

Vehicle Centre

Transportation and Travel

Need to Know

- Capture assets stored in your vehicles
- Record service history and set reminders
- Keep travel records for tax claims

DO YOU HAVE A FULL CONTENTS INVENTORY of your car or boat? Every year 60,000 cars stolen along with their contents and 18,000 are never recovered¹.

Getting your vehicle insurance cover right is very important and only regular review of your insurance needs will ensure that you have enough cover.



Vehicle Centre

Securely and discreetly record details of your vehicles so that if disaster strikes, you can prove ownership and fully recover.

Vehicles

File	Name	Manufacturer	Make/Model	Value
	Audi	Audi	Audi's Q3 compact SUV	\$90,000.00
	Caravan	Bestacraft Caravans	Touring Caravan 1993	\$3,000.00
	Man's Work Car	Toyota	121	\$75,000.00
	Motorcycle	HC	2003 MODEL	\$2,000.00
	Weekend Fishing boat	Mustang	Mustang 3300SE Sports Cruise	\$7,000.00

[Add Vehicle](#) [Manage Vehicles](#)

Locations for Vehicles

File	Custom Name	Location Type	Vehicles
	Garage	Garage	1

[Add Location](#) [Manage Locations](#)

Quick Tip: Assign vehicles to special locations and list the security options associated with that location. Also, vehicles don't have to have engines - record your valuable bicycles here too!

Use the **VEHICLE CENTRE** to manage your vehicles, insurance policies, warranty expiration, service logs and trip mileage.

THINGS YOU CAN DO:

- Add a vehicles and designate storage locations
- Add a new service history entry and associated costs
- Add trip mileage and travel destinations

¹National Motor Vehicle Theft Reduction Council, 2010

Finance Centre

Financial Awareness

Need to Know

- Stay in control of your expenses
- Track your financial accounts and income
- Receive financial alerts and reminders

DO YOU KNOW WHERE YOUR SALARY goes? If not, it's time to start budgeting. Most people wish they had a better understanding of their finances. The best way to stretch, save and spend wisely is to create a budget.

Families who are successful with their finances stick to a detailed budget. Budgets are money-saving tools that ensure your family has enough money for everyone's wellbeing.

Use the **FINANCE CENTRE** to record all the important details needed to prepare a financial budget, such as income and expenses, assets you own and when your bills are due.

THINGS YOU CAN DO:

- Add a new insurance policy - health, life, building, contents or business
- Add a new bank, loan or investment account
- Add a new income or expense item and capture the recurrence



Finance Centre

Store and track your insurance policy information. Contents policies entered here will appear as selectable when adding assets.

Policy List

File	Provider	Type	Description	Insured Value	Insured Balance	Renewal	Edit
	AAMI	Boat Insurance	Fishing Boat Policy	\$1,500.00	\$1,500.00	18 Jun 2016	0:01
	AAMI	Caravan Insurance	Holiday Camper Policy	\$5,670.00	\$5,670.00	17 Feb 2016	0:01
	QAMPS	Commercial Insurance	Professional Indemnity	\$1,200,000.00	\$1,200,000.00	19 Apr 2016	0:01
	Tower	Contents Only	Platinum Home	\$56,000.00	\$6,124.00	18 Jun 2015	0:01
	ALLIANZ	Health Insurance	Health Insurance	\$10,000.00	\$10,000.00		0:01
	Comptelure	Landlord's Insurance	Investment Property	\$346,700.00	\$346,700.00	18 Oct 2016	0:01
	MIRAL Insurance	Motor Vehicle Insurance	Vehicle Policy	\$60,000.00	\$38,000.00	27 Feb 2016	0:01

Quick Tip: Monitor your budget easily as many items are automatically displayed in the Finance Centre, such as when assets were purchased and recurring income and expenses

Need to Know

- Upload any media using high encryption
- No quality compression or image re-sizing
- File version tracking and recovery

File Centre

Secure and High Res Documents

PRECIOUS MEMORIES TAKE A LIFETIME to build and it can be devastating when they are lost. Often they are the first thing you search for in an emergency.

When a hard drive becomes corrupted, files disappear, are impossible to open, or the contents can become scrambled. Important documents you must safeguard include family papers and certificates, the family will, insurance policies, and investments.




File Centre - File View

Use this screen to replace a file (including images) in the database. Replaced files are not kept in the recycle bin.

File Details


File Name:	default_image.jpg
File Description:	Property Photo
Size:	108 KB
Image Compression:	400/200 pixels
Location:	-
Category:	-
Emergency File Type:	-
Category:	-
Version:	2



Storage Capacity

Capacity: 54.0mb used (55.4% used)

Storage Chart



Source Details

File Source:	Assets - Property
Item Group:	Property
Item Name:	My Home
Item Type:	Residential Property

File Versions

File	File Name	File Description	Version	Size	Updated	Created	Deleted
1	default_image.jpg	Property Photo	2	108 KB	31 Jul 2008	31 Jul 2008	No

Quick Tip: View older versions of your files in the File Versions table. Monitor your storage and delete large files from the Recycle Bin to free up space.

The **FILE CENTRE** displays all your uploaded files and allows you to group them. You can download the files or view them in an interactive slideshow. Have confidence to making changes knowing that original versions are always available.

THINGS YOU CAN DO:

- Upload files and create an emergency list
- Add file categories and group files together
- Link or unlink uploaded files from asset, vehicle, property and contact records

Contact Centre

Emergency and Estate Planning

Need to Know

- Quickly contact everyone who needs alerting
- Baby-sitter lists and professional advisers
- Gift register and estate planning intentions



DO YOU HAVE A COMPLETE RECORD of the important personal and professional people in your family and relatives?

Quickly accessing important contact information can make all the difference in a family emergency.

The **CONTACT CENTRE** is a secure repository of key contact names and addresses for use in the event of an emergency. Record estate planning intentions and remember gifts bought and received by assigning particular assets to contacts.

THINGS YOU CAN DO:

- Add a new contact and their photo into the address book
- Organise emergency and disaster lists, then print copies
- Review birthdays, anniversaries and important dates

Contact Centre

This is a secure repository of key contact names and addresses for use in the case of an emergency. Print off reports for babysitters, teachers and emergency personnel.

Contacts

File	First Name	Last Name	Category	Phone	Mobile	Email
	Alan	Lalic				alan.lalic@saropa.com.au
	Barry	Jefferson		02 9994 8985	0414 114 875	bjefferson@saropa.com.au
	Carm	Woolfson				carm@woolfsongfamily.com.au
	Christag	Skarford				
	David	Gale				
	Dean	Thuc				
	James	Obalik			0499 87 113	test@email.com
	Jane	Smith				
	Jeremy	Hawthorn		02 8244 1333	0400 666 546	you32@hotmail.com
	JLian	Barnes				

Quick Tip: Get automatic reminders when you add birthdays and anniversaries. Store files other than photos with contacts for easy retrieval in the future.

Medical Centre

Health and Wellbeing

Need to Know

- Upload medical files with high encryption
- Generate detailed family medical reports
- Track conditions, treatments and lifestyle

MEDICAL EMERGENCIES DEMAND up-to-date personal and medical details, with access to emergency contacts. Some information is too important for delays and inaccuracies.

Natural disasters, consultations with new doctors and hospital visits teach us that everyone should have access to their personal health information. Doctors move and records get “archived” making access to your information delayed, expensive or impossible.



Searching the **MEDICAL CENTRE** is much easier than looking through a folder full of notes, results and X-rays; and is ideal for patients or caregivers who manage a current or chronic illness.

THINGS YOU CAN DO:

- Create a new medical record for a family member
- Track allergies, treatments and medical contacts
- Manage children's immunisation schedules

Medical Centre

Track your family medical history and health issues. Keep this information updated and access it from anywhere in an emergency.

Medical Histories

Click on a Medical History record to create a custom medical report for printing.

File	Contact Name	Relationship	Health Policy	Blood Type	Conditions	Allergies	Appointments
			health-insurance ALLIAN	A+	2	1	
	Carie Westerson	Father	health-insurance ALLIAN				

[Add Medical History](#) [Manage Medical Histories](#)

Allergies

File	Allergy Group	Allergy Type	Diagnosed	Severity	Contact Name	Notes
	Animal	Bird allergy	03 Nov 2008	Mild - Irritation	Barry Jefferson	unknown

[Add Allergy](#) [Manage Allergies](#)

Medical Appointments

File	Appointment Type	Appointment	Medical Contact	Contact Name
	Check Up	02 Nov 2008	Barry Jefferson	Dean Thuc
	Other	01 Nov 2008	Barry Jefferson	Dean Thuc

[Add Appointment](#) [Manage Appointments](#)

Quick Tip: Store your medical records without worrying about theft, fire or accidental loss.

Activity Centre

Plan, Record & Recover

Need to Know

- Set up lists of things to do in an emergency
- Reminders about one-off and ongoing events
- Plan future events and review past activities



Do YOU HAVE A DETAILED LIST of things to do when things go wrong? The only way to get life back to normal with a minimum of fuss is to have prepared and practiced emergency plans.

The **ACTIVITY CENTRE** displays alerts and warnings on issues such as warranty expiration, policy renewal and reconciliation of recent purchases.

Never forget birthdays, appointments, events, or special occasions again as the other Centres automatically show important dates in the easy-to-use calendar.

THINGS YOU CAN DO:

- Add one-off and recurring events
- Define emergency reminders and meetings
- Browse historical events and plan future events

Activity Centre

This screen displays alerts and warnings on issues such as warranty expiration, policy renewal and reconciliation of recent purchases. Use the search box and filters to quickly find items.

Active Action Items

No action items were found.

Events in February 2010

File	Event Date	Event Type	Event Name	Description	Source
	19 Feb 2010	Other	Notify Michele's Work in Case of Emergency		Reminder
	12 Feb 2010	Client - Seminar	Fire Drill	Qtrly fire assessment drill (#7 of 12 quarterly occurrences...	Hearing
	18 Feb 2010	Finance - Bill	Telex	(#0 of unlimited monthly occurrences from 18th February 2...	Expense
	18 Mar 2010	Finance - Bill	Telex	(#0 of unlimited monthly occurrences from 18th February 2...	Expense
	15 Feb 2010	Anniversary	Barry Jefferson	Married on 15 Feb 1999 (12 years married)	Contact

Add Reminder Manage Reminders

Expenses in February 2010

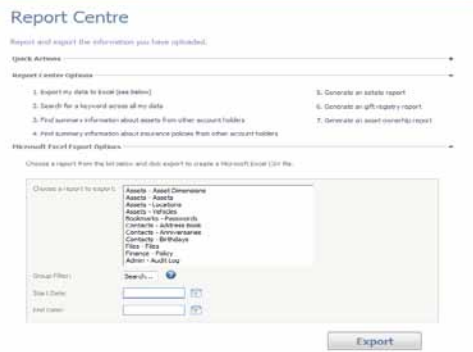
Quick Tip: Recurring income and expenses from the Finance Centre are automatically displayed.

Need to Know

- Generate pre-made and custom reports
- Export to Microsoft® Excel
- Summarise system-wide information

ACCESSING THE INTERNET may become impossible in a family emergency, so keeping a secure copy of your most valuable online information is essential.

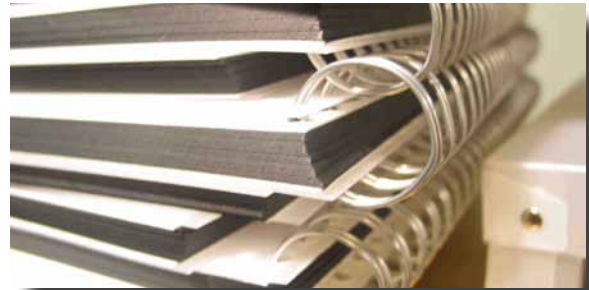
If a secure fireproof safe is not available at home, consider a bank safety deposit box or secure location away from home. With **HOME ESSENTIALS** your information is always available and cannot be lost or destroyed.



Quick Tip: Create your own reports and charts by exporting tables into to Microsoft® Excel

Report Centre

Search, Sort & Export



The **REPORT CENTRE** is the place to go when you want to find and print information. It is also the place to go when you export information into another program. Choose from a selection of reports and filter by keywords and dates.

THINGS YOU CAN DO:

- Export filtered results to an Excel® file
- Open custom report screens to see different perspectives on your information
- Search for a keywords in names and note fields from across all the Centres

Admin Centre

Customise & Secure

DATA SECURITY HAS NEVER HAD MORE SIGNIFICANCE than in the world today. Maintaining your account's security is an important responsibility whether you are at home, travel with a laptop or use a shared computer.

Your password's strength is a function of length, complexity, and randomness. For your protection, a strong password is a mandatory requirement for all **HOME ESSENTIALS** accounts.

The **ADMIN CENTRE** provides important security features to keep you safe - whether you are using your usual PC or browsing away from home. You can also configure various display options to suit your needs.

THINGS YOU CAN DO:

- Update your personal contact details
- Change your password
- Configure file groups, privacy and display settings for the website

Need to Know

- Change your account password
- Manage groups to catalogue your files
- Configure advanced security options



Admin Centre - Account Centre

Report and export the information you have uploaded.

Quick Actions

[Reset Password](#) [Account Details](#) [Preferences](#) [Security](#)

Admin Centre Options

1. Update personal details and contact information in Account Details
2. Configure privacy and display settings in Account Preferences
3. Change password periodically in Reset Password
4. Send a message to the support team in the Feedback and Support form
5. Organizing files in settings in My Groups

Quick Tip: Stay secure at all times by regularly changing your password. If you are traveling, then you can configure location-specific access.



Appendices



Checklist

Document & Media Recovery

To help you get started, here is a checklist of documents to record in your new **Home Essentials** account.

Duplicate personal papers and financial-related:

- Identification documents - driver's license, passport, citizenship certificate
- Birth and death certificates
- Marriage certificates or divorce decrees
- Health care documents and Medicare number
- Vehicle registrations, titles and deeds
- Bank and Credit card details
- Investment certificates and bonds
- Mortgages and other loan documents
- Employment contracts and tax information
- Insurance policies - contents, vehicle and life
- Trusts and Wills

Take photos of major assets and scan receipts of:

- High value furniture and art pieces
- Sports equipment and collectables
- Computer and Electrical equipment

Enter contact details for:

- Emergency contact persons
- Doctors and other care givers
- Banks, insurers, brokers and other financial institutions
- Legal advisers, financial planner, estate planner, tax agents, accountants and book-keepers
- Employers, employees and colleagues
- Utility companies - electricity, hot water, gas and internet provider (ISP)
- Preferred and certified trades-persons
- Strata manager

Upload the precious items you treasure:

- Family photos, videos, historical records
- Creative work, such as art, stories and poetry
- Family letters and correspondence

Checklist

Financial Recovery

Here is a checklist of financial and personal items to record in your new **Home Essentials** account.

Professional contacts and family members in Contact Centre:

- Emergency contact persons
- Doctors and other care givers
- Banks, insurers, brokers and other financial institutions
- Legal advisers, financial planner, estate planner, tax agents, accountants and book-keepers
- Employers
- Utility companies (electricity, hot water, gas and internet provider)
- Preferred and certified trades persons
- Strata manager

Financial documents in File Centre:

- Statement of Advice
- Portfolio Review Advice
- Will and Estate Planning

Family members' personal data in Medical Centre:

- Personal details
- Contact details
- Occupation details
- Lifestyle details (smoker or nonsmoker)

Financial assets in the Finance Centre:

- Bank accounts (savings, term deposit etc.)
- Investment asset (share, unit trust etc.)
- Superannuation
- Loans and repayments
- Insurance policies
- Regular and irregular expenses
- Regular and irregular income (salary, pension, Centrelink, freelance work etc.)

Material assets in the Asset Centre:

- Lifestyle assets (car, boat etc.)
- Properties

Location Inventory

If you don't have the ability to roam with a laptop and wireless connection, you might want to start your inventory process by photocopying and filling in this worksheet. When you are done, simply enter it using the Bulk Add Asset wizard in the Asset Centre.

QUICK TIP: For a back-up, scan this worksheet and upload the file to the File Centre or the Location.

No.	Item Name	Brand	Model & Make	Serial / Marking	Quantity	Value \$
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						

“ just one moment can take
away a lifetime of precious
memories ”

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